
Chapter 3 Patient Management Module



Overview

The Patient Management Module is used to enter and maintain the following information for a client:

- Diagnoses
- Previous Medical History
- Test Data (Skin, Chest X-Ray, Blood, HIV, Bacteriology, and Physical Examination)
- Medications
- Contacts
- Hospitalizations
- Referrals

Most information entered in the Patient Management module can be imported into the client's Report of Verified Case of Tuberculosis (RVCT), Initial Drug Susceptibility Report, and Case Completion Report using the Data Generation option in the Surveillance module.

Quick Start

Open the Patient Management Module

There are two ways to open the Patient Management module:

- Open the **C**lient menu and select **P**atient Management.

If the current module does not have a Client menu, choose the first menu from the left.

Or

- Click the **Patient Management** button on the toolbar.



Client Diagnosis

To record a diagnosis...

1. Open the **P**rofile menu and select **D**iagnosis.
2. Click the **N**ew button.
3. Enter the diagnosis information and click the **S**ave button.

Skin Test

To record the results of a skin test...

1. Open the **T**ests menu and select **S**kin or click the **Skin Test** button on the toolbar.



2. Click the **N**ew button.
3. Enter the test information and click the **S**ave button.

Chest X-Ray

To record the results of a chest x-ray...

1. Open the **T**ests menu and select **C**hest X-Ray or click the **Chest X-Ray** button on the toolbar.



2. Click the **N**ew button.
3. Enter the x-ray information and click the **S**ave button.

Bacteriology

To record the bacteriological examination results for a client...

1. Open the **Tests** menu and select **Bacteriology** or click the **Bacteriology** button on the toolbar.



2. Click the **New** button.
3. Enter the test information and click the **Save** button.

Medications

To enter TB-related medications for the current client...

1. Open the **Therapy** menu and select **Medications** or click the **Medications** button on the toolbar.



2. Click the **New** button on the medications screen and fill in the on-screen form to begin adding new drugs.
3. Follow the on-screen prompts to add additional drugs and schedule drug pick-ups.

Overview: Client Profile

Developing a client profile is one of the most important aspects of TIMS. A client profile keeps track of additional information about the client that is not gathered in the Client or Surveillance modules.

A profile includes:

- Contact Information
- Client Diagnoses
- Medical History
- Hospitalization Records
- Referral Information

Contact Information

A contact is someone who is associated with a client and who may have been exposed to TB through their association with that client. Contacts must be evaluated for tuberculosis and, if necessary, converted to a client so that they can begin receiving TB-related services from your facility.

Note: Users with Low access privileges cannot add, edit, or delete contact information.

Add Exposure Site Information

When available, record information about the location where a contact was exposed to the client. The exposure site should be documented as thoroughly as possible. You must have at least a site name to save the exposure site record.

To add an exposure site...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Contacts** or click the **Contact** button on the toolbar.



If there is no current client, the Change Focus window will open, enabling you to select one.

3. Click the **Sites** button in the Exposure Site Information group.

This displays the Exposure Sites dialog box.

Name of Site	City	Phone
AARDEMA SITE 1	LITHIA SPRINGS	(999) 999-9999

Locating Information

Site: AARDEMA SITE 1

Address: 669 SITE 1 AVE

City: LITHIA SPRINGS State: GA Phone: (999) 999-9999

Buttons: New, Edit, Delete, Save, Close

4. Click the **New** button

If the New button is disabled, click the selected Exposure Site in the browse list to cancel the selection.

5. Enter a descriptive name for the site.

6. Enter as much address and phone information as possible in the appropriate fields.
7. Click the **Save** button.
8. Click the **Close** button.

Edit an Exposure Site

If additional information about an exposure site becomes available, or existing information needs to be updated, use the Edit feature to make the changes.

To edit an exposure site...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Contacts** or click the **Contact** button on the toolbar.



If there is no current client, the Change Focus window will open, enabling you to select one.

3. Click the **Sites** button in the Exposure Site Information group.
4. Select the exposure site you want to modify from the Sites Identified list and click the **Edit** button.

Sites Identified		
Name of Site	City	Phone
WNUOVZRK	BEALE AFB	(777) 555-1212

5. Make the necessary changes to the selected exposure site.
6. Click the **Save** button. To undo your changes, click the **Undo** button.
7. Click the **Close** button.

Delete an Exposure Site

If exposure site information is no longer valid, or was originally entered erroneously, it should be removed from the client record. Use the Delete feature.

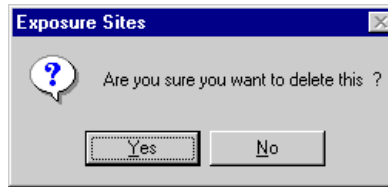
1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Contacts** or click the **Contact** button on the toolbar.



If there is no current client, the Change Focus window will open, enabling you to select one.

3. Click the **Sites** button in the Exposure Site Information group.
4. Select the exposure site you want to delete.
5. Click the **Delete** button.

- Click **Y**es to confirm that you want to delete the selected site.



- Click the **C**lose button.

Add a New Contact

Enter identification, address, relationship, and other information in the Contact Information area. Contact records must have at least a first and last name.

To record information about a client contact...

- Open the **P**atient **M**anagement module.
- Open the **P**rofile menu and select **C**ontacts or click the **C**ontact button on the toolbar.



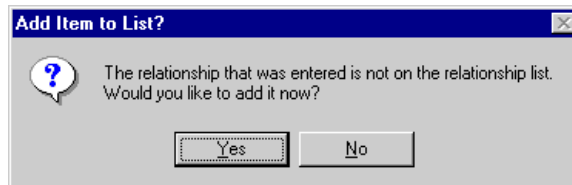
If there is no current client, the Change Focus window will open, enabling you to select one.

- Click the **N**ew button.
If the New button is disabled, click the selected Contact in the browse list to cancel the selection.
- Enter the contact's name and address information in the appropriate fields.

A form for entering contact information. It includes fields for "Last Name:", "First Name:", and "Address:". Below the address field are two more lines for address details. There are also dropdown menus for "City:", "State:" (with "GA" selected), and "County:". At the bottom, there is a "Zip:" field with a hyphen for a zip+4 format.

- Select the interview date from the Interview Date list if the client has been interviewed.
- Select an exposure site from the Exposure list. If the appropriate exposure site is not on the list, you can add it by clicking the **S**ites button in the Exposure Sites Information group. Also, enter the **Last Exposure Date**, which is the last date on which the contact was exposed to the potentially infectious client.
See Add Exposure Site Information earlier in this chapter for additional information.
- Select the contact type from the Priority list.
 - Close indicates that the contact has had prolonged close-proximity exposure to the client.
 - Casual indicates the contact has had less intense or not as prolonged exposure to the client.

8. Select the **Not Indicated for Exam** check box if examination of Close contacts yields little or no evidence that the current client is transmitting TB (it is not necessary to test Casual contacts if Close contacts are not becoming infected). This will exclude the current contact from the Contact Report. This option is only available for Casual contacts.
9. Enter or select the Contact's date of birth in the Birthdate field.
This will automatically update the Age field.
10. Select the Contact's relationship with the client from the Relationship list. If the current list does not contain the appropriate relationship, you can type a new one to add it to the list.



11. Enter the Contact's phone number in the Phone field.
12. Click the **S**ave button.
13. Click the **C**lose button.

Edit Contact Information

If you need to modify information about a client contact, use the Edit feature.

To edit contact information...

1. Open the **Patient Management** module.
2. Open the **P**rofile menu and select **C**ontacts or click the **C**ontact button on the toolbar.



If there is no current client, the Change Focus window will open, enabling you to select one.

3. Select the contact you want to edit from the Contact Information browse list and click the **E**dit button.

Contact Information				
Date Identified	Name	Relationship	Exposure Site	Priority
05/12/2000	XGFRCKRZYG, BKNBYBIHKT	UNCLE	WNUOVZBK	CASUAL

4. Make the necessary changes to the selected contact.
5. Click the **S**ave button to record your changes. To undo your changes, click the **U**ndo button.
6. Click the **C**lose button.

Delete Contact Information

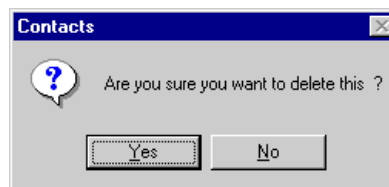
To remove a contact from the TIMS database...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Contacts** or click the **Contact** button on the toolbar.



If there is no current client, the Change Focus window will open, enabling you to select one.

3. Select the Contact you want to remove from the Client Information browse list and click the **Delete** button.
4. Click the **Yes** button to confirm that you want to delete the selected Contact. Click the **No** button to abandon the delete operation.



5. Click the **Close** button.

Documenting Contact Interviews

Contacts should be interviewed whenever possible to confirm their association with the client and evaluate their level of exposure to tuberculosis. If necessary, the contact can be converted to a client and begin receiving TB-related services from your facility. You must have both the interview date and interviewer name to save the interview record.

To add a contact interview record...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Contacts** or click the **Contact** button on the toolbar.



If there is no current client, the Change Focus window will open, enabling you to select one.

3. Click the **Add** button in the Interview Information group.

Interview Information	
Date	Interviewer
04/01/1997	Bobbi Boron
04/09/1997	Helen Hydrogen

4. Enter or select the interview date, if necessary.



The 'Interview Information' dialog box has a title bar with a close button. It contains two input fields: 'Date:' with a date picker showing '04/09/1997' and 'Interviewer:' with a dropdown menu. At the bottom are 'OK' and 'Cancel' buttons.

5. Select the name of the person who conducted the interview from the Interviewer list.
6. Click the **OK** button.

To delete a contact interview record...

1. Select the interview record in the Interview Information group.
2. Click the **Delete** button.

Converting a Contact to a Client

If the results of a contact interview or other factors indicate that a contact needs to be evaluated for tuberculosis, they should be converted to a client. **Once a contact has been converted to a client, their information can no longer be modified in the Contacts window.**

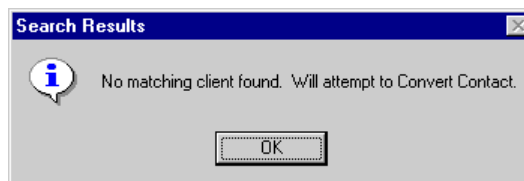
To convert a contact to a client...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Contacts** or click the **Contact** button on the toolbar.



If there is no current client, the Change Focus window will open, enabling you to select one.

3. Select the contact you want to convert in the Contact Information list.
4. Click the **Convert** button.
5. Click **Yes** to allow TIMS to search for a match between the contact and an existing client.
6. Do one of the following, depending on the results of the search:
 - If there was no match, click the **OK** button to begin the conversion process.



The 'Search Results' dialog box has a title bar with a close button. It contains an information icon (i) and the text 'No matching client found. Will attempt to Convert Contact.' At the bottom is an 'OK' button.

Or

- If the search produces possible matches, evaluate the displayed clients to determine if they are the same person.

Select Client to Merge or Add If Not on List or CANCEL To return to Contact

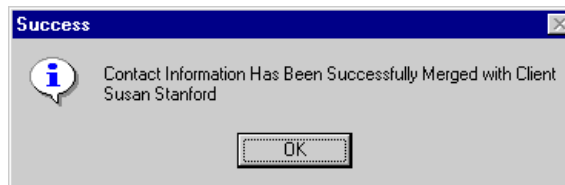
Possible Matches for Stanford, Susan

Last Name	First Name	Social Security #	Date of Birth
Stanford	Susan	000-55-5510	05/05/1955

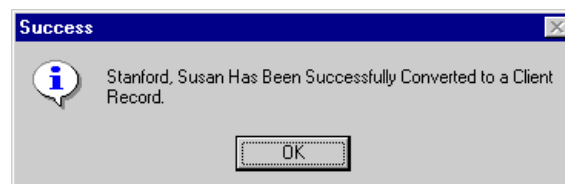
Add Stanford, Susan

OK Cancel

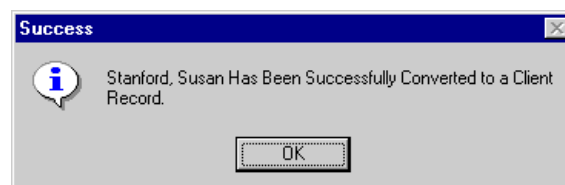
- If the contact is already listed in TIMS as a client, select the client listing and click the **OK** button. This will merge the contact information with the selected client record.




- If none of the possible matches is the same person as the contact, click the **Add** button.



7. If you are converting the contact, TIMS will inform you if the conversion was successful. Click the **OK** button to close the dialog box.



Notice that the contact now has a client icon in the record header.

Contact Information				
Date Identified	Name	Relationship	Exposure Site	Priority
05/12/2000	 XGFBCBZYG, BKNBY8IHXTUNCLE		WNUOVZRK	CASUAL

Merging Contact Information with an Existing Client

You may occasionally find that a person entered as a contact has also been entered as a client. TIMS allows you to combine the information entered in a contact record with the information in a client record.

To merge a contact with a client...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Contacts** or click the **Contact** button on the toolbar.



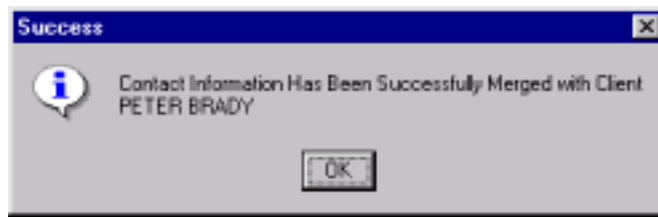
If there is no current client, the Change Focus window will open, enabling you to select one.

3. Select the contact you want to merge from the Contact Information list.
4. Click the **Merge** button.

The system will then perform a search for all possible matches.

5. Select a client to merge from the Choose Client to Merge window by clicking on that client.

6. Click **OK**.
7. Click the **OK** button on the Success window.



Client Diagnosis

A diagnosis is used to classify a client's TB status. Therapy and services provided to a client are based on the current diagnosis. Many functions in the Patient Management module (medications and tests) are not available for clients that do not have at least one diagnosis.

Although a diagnosis is entered in the Patient Management module, TIMS will not report the client's TB status (transmit the data to CDC) unless the RVCT form has been created in the Surveillance module. An RVCT should be created for clients with Case or Suspect diagnoses.

A client can have multiple diagnoses, but only one per day. The most recent diagnosis is the current diagnosis. The 'Suspect' diagnosis classification is only temporary and must be changed within 90 days.

The diagnoses are:

- Not Infected
- Infected
- Case
- Old TB
- Suspect
- Not TB
- Rule Out Infection

TIMS will allow provisional “Screened” and “Contact” status. However, only HIV and Skin tests can be documented for these clients until a diagnosis is added.

Note: Users with Low access privileges cannot add, edit, or delete client diagnoses.

Add a Client Diagnosis

To enter a client diagnosis for the current client...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Diagnosis**.

If there is no current client, the Change Focus window will open, enabling you to select one.

3. Click the **New** button.

If the New button is disabled, click the selected Diagnosis in the browse list to cancel the selection.

Date	Diagnosis	Diagnostician	Screened	Contact
11/11/1999	Suspect	~WORKER, DEFAULT	Yes	Yes
07/20/2000	Case	~WORKER, DEFAULT	Yes	

Current Client: AARDEMA, ALEXANDER

Date: 11/11/1999 Diagnostician: ~WORKER, DEFAULT

Client is being screened : ☒ Format:

Activity/Group: REACTOR

Client has been in contact with active TB : ☒

Diagnosis:

☐ Not Infected ☒ Suspect ☐ Not TB

☐ Infected ☐ Old TB

☐ Case ☐ Rule Out Infection

Candidate for Treatment? ☐ Yes ☐ No

ATS classification number: 5

Major Site of Disease: PLEURAL

☒ Pulmonary ☐ Extrapulmonary ☐ Both

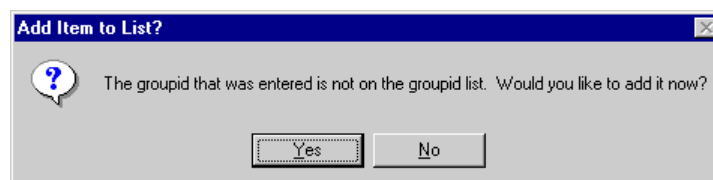
Haz client had curative therapy in the past? ☒ Yes ☐ No ☐ Unknown

Buttons: New, Edit, Delete, Save, Close

4. Enter or select the diagnosis date in the Date field.
The current date is the system default.
5. Select the person who made the diagnosis from the Diagnostician list.
6. Select the **Client is being screened** check box, if the client is being screened individually as part of an organized tuberculosis screening program, or for other purposes (except for being a contact to TB).
This will activate the Format and Activity/Group lists.
7. Select the appropriate testing format (administrative, individual, project, referral).
Refer to Basic Instructions for the Aggregate Reports for Tuberculosis Program Evaluation: Targeted Testing and Treatment for Latent Tuberculosis Infection (Appendix PEI-Program Evaluation Forms) for definitions and instructions.
8. Do one of the following:
 - If you selected Client is being screened, choose the name of the organization, group, or program sponsoring the TB screening for Activity/Group.

Or

 - If the screening organization is not in the list, type in the name and click **Yes** to confirm that you want to add it.



9. Click **OK** to clear the confirmation dialog box.

10. If the client is known to have been in contact with active tuberculosis, select the **Client has been in contact with active TB** check box.

This will be checked automatically if the client is a converted or merged contact.

11. Select the appropriate diagnosis from the Diagnosis group.

12. Enter the ATS (American Thoracic Society) Classification Number code for the diagnosis.

If the ATS code number you enter does not match the diagnosis you selected, you will be asked to reconsider your selection.

Number	Summary	Description
"0"	No TB exposure Not infected	No history of exposure. Negative reaction to tuberculin skin test.
"1"	TB exposure No evidence of infection	History of tuberculosis exposure. Negative reaction to tuberculin skin test.
"2"	TB infection No disease	Positive reaction to tuberculin skin test. Negative bacteriologic studies (if done). No clinical or radiographic evidence of TB.
"3"	Current TB disease	M. tuberculosis culture (if done) or Positive reaction to tuberculin skin test and clinical or radiographic evidence of current disease. Corresponds with Case.
"4"	Previous TB disease	History of TB episode(s) or Abnormal but stable radiographic findings. Positive reaction to the tuberculin skin test. Negative bacteriologic studies (if done) and no clinical or radiographic evidence of current disease.
"5"	TB suspected	Diagnosis pending

13. Select the appropriate response to the question: Has client had curative therapy in the past?

14. When available, select a location from the Major Site of Disease option buttons and the actual disease site from the drop-down list.

15. Click the **Save** button.

16. Click the **Close** button.

Edit a Client Diagnosis

You can change the details of a client diagnosis using the Edit feature. Changes are limited to supporting information; you cannot change the actual diagnosis. If the diagnosis changes, you must enter a new diagnosis.

To change diagnosis information...

1. Open the **Patient Management** module.

2. Open the **Profile** menu and select **Diagnosis**.

If there is no current client, the Change Focus window will open, enabling you to select one.

3. Select the diagnosis you want to edit from the Client Diagnosis browse list and click the **Edit** button.

Date	Diagnosis	Diagnostician	ScreenedContact	
03/02/1996	Not Infected	Bobbi Boron		
08/08/1996	Suspect	Default Worker	Yes	
11/05/1996	Infected	Dr. Henry Helium		
04/25/1997	Case	Dr. Helen Hydrogen	Yes	Yes

4. Make the necessary changes to the details of the diagnosis.

Remember: You cannot change the actual diagnosis.

5. Click the **Save** button to record your changes. Click the **Undo** button to cancel your changes.
6. Click the **Close** button.

Delete a Client Diagnosis

You can remove a client diagnosis using the delete function. Since a diagnosis is part of a client's permanent record, you should only delete them when absolutely necessary.

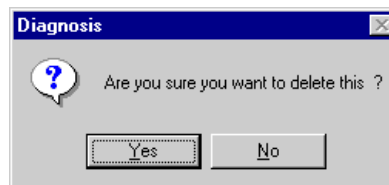
To delete a client diagnosis...

1. Open the **Patient Management** module.

2. Open the **Profile** menu and select **Diagnosis**.

If there is no current client, the Change Focus window will open, enabling you to select one.

3. Select the diagnosis you want to delete from the Client Diagnosis list.
4. Click the **Delete** button.
5. Click **Yes** to confirm that you want to delete the diagnosis or **No** to cancel.



6. Click the **Close** button.

Client History

A comprehensive tuberculosis history can help determine the proper services required to treat the client's current condition. The History function keeps track of previous TB infections, related diseases, and other information relevant to treating tuberculosis.

Information entered in the Client History screens can also be imported and used as surveillance data. See the *Generate Data* section in the Surveillance Module chapter for additional information.

Note: Users with Low access privileges cannot add or edit client history records.

Record Client History

To enter a client history...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **History**.

If there is no currently selected client, the Change Focus window will open, enabling you to select one.

The screenshot shows a software window titled "Client History" for a client named "AARDEMA, ALEXANDER". The window has a menu bar (Client, Profile, Therapy, Tests, Reports, Window, Help) and a toolbar with various icons. The main content area is divided into several sections:

- History of Present Illness:** A large text area for describing the client's current condition.
- Past Medical History:** A section with multiple rows of radio button options for "Yes", "No", and "Unk".
 - Previous Diagnosis of TB:** Includes a date field (Mo./Yr.: 12/1990) and a "More than one Episode" section with "Yes" and "Unk" options.
 - Previous Skin Test for TB:** Includes a "Results" section with "+" and "-" radio buttons, and a date field (Mo./Yr.: 12/1990).
 - BCG Vaccination:** A single "Yes" radio button option.
 - Prior HIV Test:** Includes a "Results" section with "+" and "-" radio buttons, and a date field (Mo./Yr.: 12/1990).
 - Diabetes:** A "Yes" radio button option.
 - Hospitalized in Last Year:** A "Yes" radio button option.
 - Current Tobacco Use:** Includes an "Amount" field (23) and a "Cig/Day" dropdown menu.
 - Silicosis:** A "Yes" radio button option.
- Risk factors for TB Infection/Disease:** A dropdown menu at the bottom.

3. Enter a brief text-based description of the client's current condition in the History of Present Illness field. The field can hold up to 240 characters.
4. Select the appropriate option button to answer the medical questions on the page. The options are Yes, No, and Unk (Unknown). When a **Yes** option is selected, space for additional information may be displayed. Complete the information as thoroughly as possible.
 - **Previous Diagnosis of TB** - Enter or select the month and year of the most recent prior tuberculosis episode. Select **Yes** or **Unknown** for multiple previous episodes.
 - **Previous Skin Test for TB** - Enter or select the results, induration, and month and year of a previous tuberculin skin test

- **BCG Vaccination** - Enter or select the date of the vaccination.
- **Previous HIV Test** - Enter or select the results and date of the prior HIV test.
- **Diabetes** - Indicate if the client is currently using insulin.
- **Hospitalized in Last Year** - Enter the hospital where the client was treated and the reason for the hospitalization.
- **Current Tobacco Use** - Enter the number of cigarettes the client smokes in a given time period. Use the drop-down list to describe the number of cigarettes smoked.
- **Silicosis** - Indicate if the client has ever been diagnosed with silicosis.
- **Risk Factors for TB Infection/Disease** – Indicate risk factor: medical, population, medical and population or none.

Refer to Basic Instructions for the Aggregate Reports for Tuberculosis Program Evaluation: Targeted Testing and Treatment for Latent Tuberculosis Infection (Appendix PEI-Program Evaluation Forms) for definitions and instructions.

5. Click the **Screen2** button.
6. Complete the additional history medical information. Valid responses are **Yes**, **No**, and **Unk** (Unknown).
7. Indicate if the client is currently taking any medication that could interfere with TB medications. If the answer is **Yes**, enter details in the space provided.
8. Record any known allergic reaction to drugs in the Medications Allergies field.
9. Click the **Screen3** button.
10. Respond appropriately in the Homeless Within Past Year group.
11. Respond appropriately in the Resident of Correctional Facility at Time of Diagnosis group. If the answer is **Yes**, select the type of facility.
12. Respond appropriately in the Resident of Long-Term Care Facility at Time of Diagnosis group. If the answer is **Yes**, select the type of facility.
13. Indicate the client's Injected/Non-Injected Drug and Alcohol use.
14. Indicate the client's Occupation(s). If the answer is Other, enter the actual occupation in the space provided.
15. Click the **Save** button. This will save information from all three Client History screens.
16. Click the **Close** button.

Edit Client History

You can make changes to the client history from within the Patient Management module at any time. Changes made in client history will be automatically updated in the Surveillance module if that data resulted from a Generate Data operation.

To make changes to client history...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **History**.
3. Modify the History screens as necessary.
4. Click the **Save** button.
5. Click the **Close** button.

Hospital or Facility Chronological Summary

The Hospital/Facility Chronology Summary allows you to keep track of medical treatment the client received outside your facility. While the information is kept for information purposes only, the additional data may help resolve problems regarding the clients' medical history, medications administered recently, and other health-related information.

Hospital/Facility records must have an admission date earlier than or on the current date.

Note: Users with Low access privileges cannot add, edit, or delete Hospital/Facility records.

Add a Hospital/Facility Chronology Summary

To enter a Hospital/Facility Chronology Summary...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Hospital/Facility**.
If there is no current client, the Change Focus window will open, enabling you to select one.
3. Click the **New** button.
4. Enter as much information about the facility and the client's relationship with the facility as possible. Also, indicate if the client received TB medication while being treated at the facility.
5. If medication was provided at the hospital upon discharge a check must be entered in the box next to **TB Medication Was Provided**.

The screenshot shows a form titled "Hospital/Facility" with the following fields and controls:

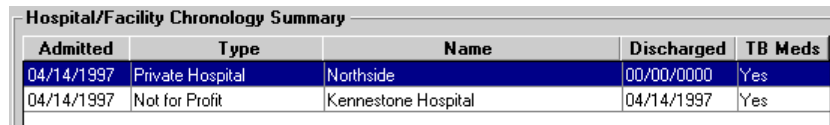
- Chart Number:** A text input field.
- Admission Date:** A date picker showing "05/15/1997".
- Discharge Date:** A date picker showing "00/00/0000".
- Name:** A text input field.
- Type:** A dropdown menu.
- Phone Number:** A text input field with a format of "() - ".
- TB Medication Was Provided:** A checkbox.
- Comments:** A large text area at the bottom.

6. Click the **Save** button.
7. Click the **Close** button.

Edit a Hospital/Facility Chronology Summary

To change a Hospital/Facility Chronology Summary...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Hospital/Facility**.
If there is no current client, the Change Focus window will open, enabling you to select one.
3. Select the record you want to change from the Hospital/Facility Chronology Summary list and click the **Edit** button.



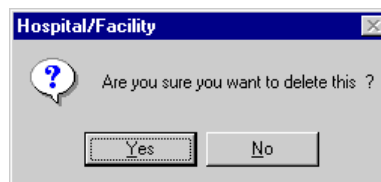
Admitted	Type	Name	Discharged	TB Meds
04/14/1997	Private Hospital	Northside	00/00/0000	Yes
04/14/1997	Not for Profit	Kennestone Hospital	04/14/1997	Yes

4. Make the necessary changes to the selected Hospital/Facility Chronology Summary record.
5. Click the **Save** button.
6. Click the **Close** button.

Delete a Hospital/Facility Chronology Summary

To delete a Hospital/Facility Chronology Summary...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Hospital/Facility**.
If there is no current client, the Change Focus window will open, enabling you to select one.
3. Select the record you want to delete from the Hospital/Facility Chronology Summary list and click the **Delete** button.
4. Click the **Yes** button to confirm that you want to delete the summary. Click the **No** button to cancel the delete operation.



5. Click the **Close** button.

Client Referrals

A referral is the person or organization that sent a client to your facility. Referral information includes the name of the source, the reason for referral, the date referred, and referral contact information. A referral record must contain a referral source, referral date, and referral reason. There are no restrictions on the number of referrals associated with a client.

Note: Users with Low access privileges cannot add, edit, or delete client referral records.

Add a Referral Record

To enter a referral record...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Referrals**.

If there is no current client, the Change Focus window will open, enabling you to select one.

3. Click the **New** button.

The screenshot shows a form titled 'Add a Referral Record'. It contains the following fields:

- Referral Date:** A text field with the value '00/00/0000' and a calendar icon.
- Referral Reason:** A dropdown menu.
- Referral Source:** A text field.
- Name:** A text field.
- Address:** A text field.
- City:** A text field.
- State:** A dropdown menu.
- Zip:** A text field.
- Phone:** A text field with a format '() - '.

4. Enter as much information as possible about the client referral. There must be a date, reason, and source to record the referral.
 - **Referral Reason** describes purpose for sending the client to your facility. This might include a suspicious cough, suspected exposure to infectious persons, etc.
 - **Referral Source** is the person or organization that sent the client to your facility. Organizations might include hospitals, schools, employers, etc.
5. Click the **Save** button.
6. Click the **Close** button.

Edit a Referral Record

To modify a client referral record...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Referrals**.

If there is no current client, the Change Focus window will open, enabling you to select one.

3. Select the referral you want to modify from the browse list and click the **Edit** button.

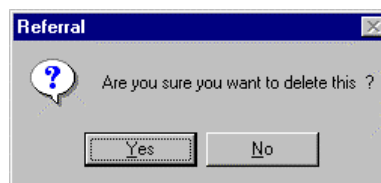
Date	Reason	Source
03/26/1997	Suspicious Cough	Acme Machine Tools Inc
04/28/1997	possible exposure to tb	Attapulgis Elk Lodge 1024

4. Make the necessary changes to the selected referral record.
5. Click the **Save** button.
6. Click the **Close** button.

Delete a Referral Record

To delete a client referral record...

1. Open the **Patient Management** module.
2. Open the **Profile** menu and select **Referrals**.
If there is no current client, the Change Focus window will open, enabling you to select one.
3. Select the referral record you want to delete from the browse list and click the **Delte** button.
4. Click the **Yes** button to delete the record or click the **No** button to cancel.



5. Click the **Close** button.

Overview: Client Therapy

TIMS allows users to document the following drug information for clients:

- Pickups and delivery of drugs
- Starting and stopping of drugs
- Method of delivery
- Dosages and frequencies
- Types of therapy

You can also record and review medications information using the Therapy menu in the Patient Management module.

- Medications
- View Pick-Up / Delivery
- Drug-O-Gram (not currently available)

Medications

Medications records the therapeutic regimen prescribed to treat a client's tuberculosis infection or disease. There are two types of therapy: Curative and Preventive. The diagnosis will determine which therapeutic regimen to initiate and which drug(s) will be administered by the health care provider.

Pictured below is a view of the main Medication Therapy window. This window provides a list of all prescribed drugs and their current statuses. This window also allows the worker to add a new drug, edit or delete existing drugs, stop individual drugs or all therapy, view modifications to the therapeutic regimen, and schedule or reschedule drug pick-ups.

Current Client: OLD, CLIENT

Medications

Drug	T	Dosage	Unit	Freq	Start Date	Stop Date	Status
INH	D	300	mg	2x/Week	12/18/2000	02/12/2001	OPEN
RIF	D	600	mg	2x/Week	12/18/2000	02/12/2001	OPEN
PZA	D	1000	mg	2x/Week	12/18/2000	02/12/2001	OPEN
EMB	D	1200	mg	2x/Week	12/18/2000	02/12/2001	OPEN

Drug

New

Edit

Delete

Schedule

Stop

Stop All Therapy

Modifications

Pick-Ups

Close

Add New Drugs

Use the following steps to add a drug to the Medications regimen.

Note: TIMS will not allow you to enter a drug unless a diagnosis has been entered for the current client.

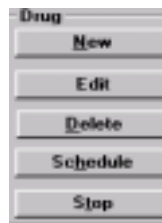
To enter drugs...

1. Open the **Patient Management** module.
2. Open the **Therapy** menu and select **Medications** or click the **Medications** button on the toolbar.



If there is no current client, the Change Focus window will open, enabling you to select one.

3. Click the **New** button in the Drug group.



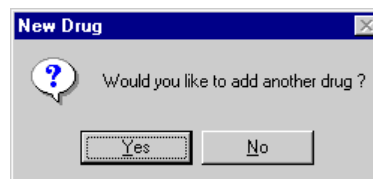
4. Enter the necessary data in the designated fields of the New Drug dialog box.

The 'New Drug' dialog box contains the following fields and options:

- Drug:** A dropdown menu.
- Dosage:** A numeric input field followed by a unit dropdown (currently 'mg').
- Start Date:** A date picker field showing '00/00/0000'.
- Route:** A dropdown menu (currently 'Oral').
- Expected Stop Date:** A date picker field showing '00/00/0000'.
- Frequency:** A dropdown menu.
- Prescribed By:** A text input field.
- Method of Delivery:** Radio buttons for 'Directly Observed' and 'Self-Administered'.
- Type of Therapy:** Radio buttons for 'Curative' and 'Preventive'.
- Buttons:** 'OK' and 'Cancel' on the right side.

Note: TIMS will automatically calculate an expected stop date of 8, 24, or 36 weeks after the start date. After entering the start date, right-click on the expected stop date field and select the appropriate duration.

5. Click the **OK** button, or **Cancel** to return to the main Medication Therapy window.

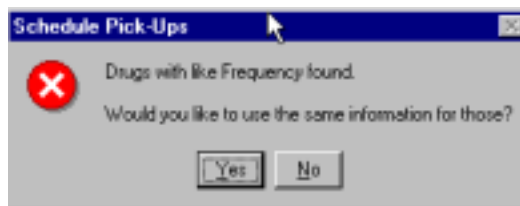


6. Click the **Yes** button to add new drugs. Repeat this procedure until all drugs have been added.
7. When all drugs are entered, click **No** on the New Drug dialog box.

- Use the Schedule Drug Pick-Ups dialog box to schedule drug pick-up appointments for the client.

The following example is for Directly Observed Therapy. Select a weekly or monthly repeat cycle if therapy is self-administered.

- Click the **OK** button.
- If there are additional drugs that are on similar or identical schedules, TIMS will ask if you want to use the same pick-up schedule information for those drugs. Click the **Yes** button if appropriate.



Edit a Drug

To edit a drug...

- Open the **Patient Management** module.
- Open the **Therapy** menu and select **Medications** or click the **Medications** button on the toolbar.



If there is no current client, the Change Focus window will open, enabling you to select one.

- Select the drug you want to edit, and click the **Edit** button.

The Method of Delivery field may not be edited. If you need to change the method of delivery, you should delete the drug and re-enter it.

- Make the appropriate changes and click the **OK** button.

If you make changes to the start or stop date fields, you will be asked to reschedule the pick-ups for that drug.

Delete a Drug

To delete a drug...

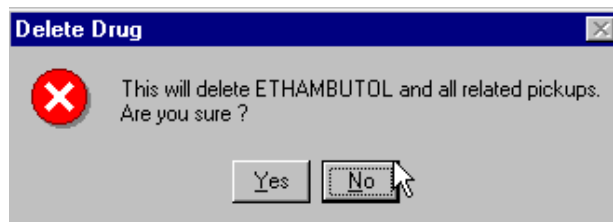
1. Open the **Patient Management** module.
2. Open the **Therapy** menu and select **Medications** or click the **Medications** button on the toolbar.



If there is no current client, the Change Focus window will open, enabling you to select one.

3. Select the drug you would like to delete, and click the **Delete** button.

The Delete Drug message box appears.



4. Click **Yes** to confirm that you want to delete the drug and all related pickups.

Edit Pick-Ups (Schedule)

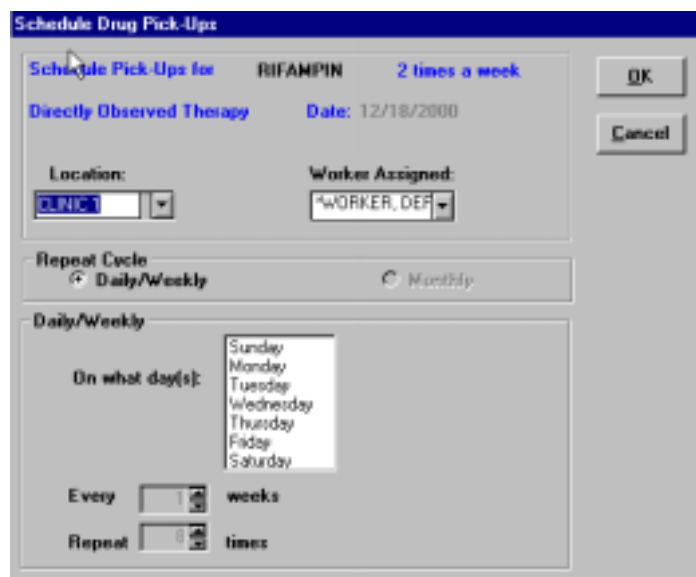
To change the location, worker, or scheduled appointments for drug pick-ups...

1. Open the Patient Management module.
2. Open the **Therapy** menu and select **Medications** or click the **Medications** button on the toolbar.



If there is no current client, the Change Focus window will open, enabling you to select one.

3. Select the drug whose pick-up schedule you would like to edit, and click the **Schedule** button.



4. Make desired changes to location, worker, or pick-up appointment schedule.
5. Click the **OK** button.

Stop a Drug

If necessary, TIMS will allow you to permanently discontinue or reschedule medications.

Note: You cannot stop a medication if there are past-due pick-ups. Please resolve all outstanding drug pick-up issues before attempting to stop a medication.

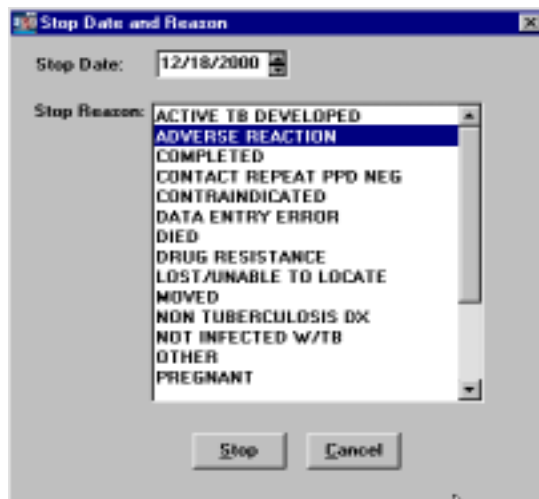
To stop a *single* drug...

1. Open the **Patient Management** module.
2. Open the **Therapy** menu and select **Medications** or click the **Medications** button on the toolbar.



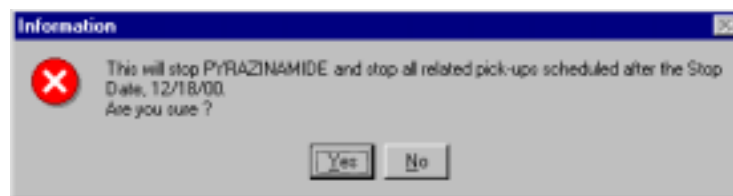
If there is no current client, the Change Focus window will open, enabling you to select one.

3. Select the drug you would like to stop and click the **Stop** button.
4. Enter the Stop Date and select the reason for stopping the medication from the list of options that appears.



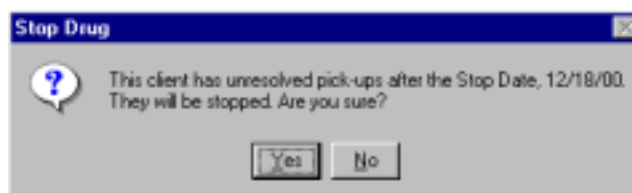
5. Click **Stop**.

The Information dialog box appears.



6. Click **Yes** to confirm that you want to stop the medication and all related pick-ups.

If there are unresolved pick-ups after the stop date, the Stop Drug dialog box appears.



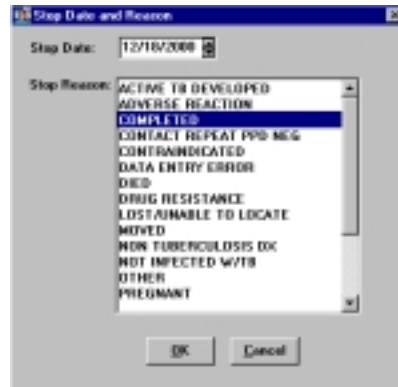
7. Click **Yes** to confirm that you want to stop pick-up appointments scheduled for after the stop date.

To stop *all* drugs...

1. Open the **Patient Management** module.
2. Open the **Therapy** menu and select **Medications** or click the **Medications** button on the toolbar.



3. Click the **Stop All Therapy** button.
4. Enter the Stop Date and select a reason for stopping all medication from the list of options that appears below.



5. Click **OK**.

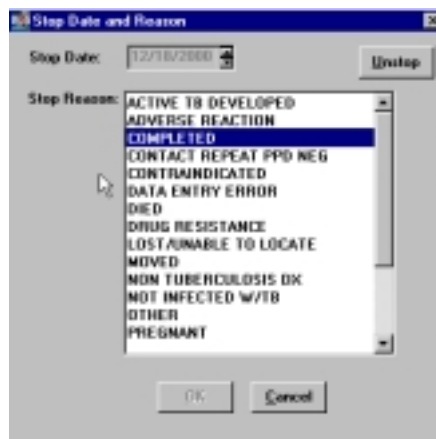
Modify a Stop

To change the stop date or reason for a drug that was previously stopped...

1. Select a drug
2. Click the **Modify Stop** button.



3. To change the stop reason, select another reason from the list and click **OK**. To remove the stop (reopen the medication), click on the **Unstop** button and then enter the Unstop Date. Click **OK**.



Sort the Medications Window

To sort the order in which drugs are displayed...

1. Open the **Patient Management** module.
2. Open the **Therapy** menu and select **Medications** or click the **Medication** button on the toolbar.



If there is no current client, the Change Focus window will open, enabling you to select one.

3. Right-click on one of the medication lists.
4. Select a sort criterion from the menu that appears.

Or

- Click on the gray column heading bar of the column on which you would like to sort.

Medications							
Drug	T	Dosage	Unit	Freq	Start Date	Stop Date	Status
INH		Sort By Drug		Week	05/12/2000	10/12/2000	OPEN
PZA		Sort By Start Date		Week	05/12/2000	10/24/2000	OPEN
RIF		Sort By Status		Week	05/12/2000	10/18/2000	OPEN

View a Drug Modification Summary

You can view a list of medications entered, including any modifications that have been made, by clicking the **Modifications** button.

Drug Modifications				
Drug Modifications				
Date	Drug	Modification	Field Modified	UserID
01/11/2000	INH	Added To Plan		SYSADMIN
01/11/2000	RIF	Added To Plan		SYSADMIN
01/11/2000	PZA	Added To Plan		SYSADMIN
01/11/2000	EMB	Added To Plan		SYSADMIN
01/11/2000	STR	Added To Plan		SYSADMIN
01/11/2000	RIF	Stopped in Plan		SYSADMIN

Close

You can also change the order in which modifications are displayed.

To change the sort order of the drug modifications list...

1. Open the **Patient Management** module.
2. Open the **Therapy** menu and select **Medications** or click the **Medications** button on the toolbar.

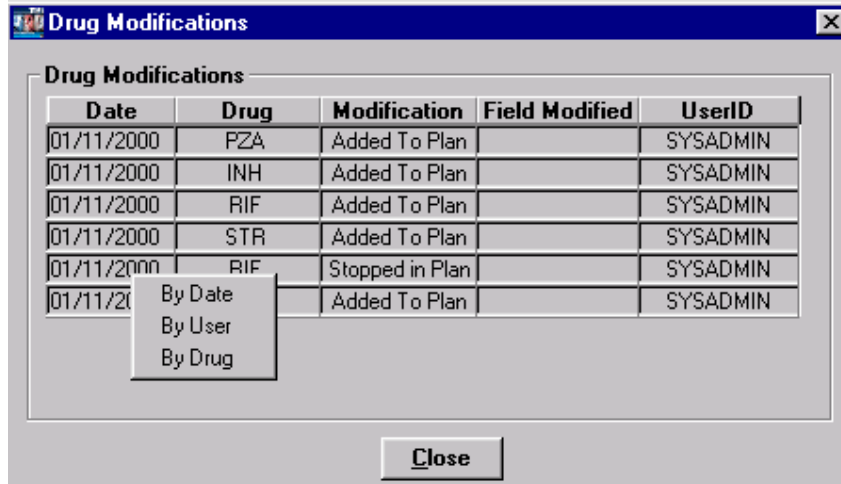


If there is no current client, the Change Focus window will open, enabling you to select one.

3. Click the browse list with the right mouse button.
4. Select the desired sort order from the menu that appears.

Or

- Click on the gray column heading bar of the column on which you would like to sort.



Confirm Drug Pick-Ups

TIMS enables the user to keep track of the client's adherence to medicinal therapy. The Drug Pick-Ups window permits you to record the client's compliance with his or her scheduled drug pick-up appointments.

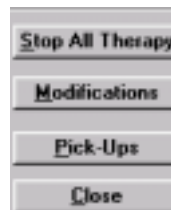
To record compliance with a drug pick-up appointment...

1. Open the **Patient Management** module.
2. Open the **Therapy** menu and select **Medications** or click the **Medications** button on the toolbar.



If there is no current client, the Change Focus window will open, enabling you to select one.

3. Click the **Pick-Ups** button.



4. Select the drug(s) you want to process from the list. You may confirm more than one pick-up at a time (see *Confirm Multiple Pick-Ups* later in this chapter for details).

Date	Drug	T	Status	Worker	Location	Divrd	Leftover
03/27/2000	RIF		DELIVERED	*WORKER, DEFAULT	CLINIC 1	1	0
03/29/2000	RIF		PAST DUE	*WORKER, DEFAULT	CLINIC 1		
04/03/2000	RIF		PAST DUE	*WORKER, DEFAULT	CLINIC 1		
04/05/2000	RIF		PAST DUE	*WORKER, DEFAULT	CLINIC 1		
04/10/2000	RIF		PAST DUE	*WORKER, DEFAULT	CLINIC 1		
04/12/2000	RIF		PAST DUE	*WORKER, DEFAULT	CLINIC 1		
04/17/2000	RIF		PAST DUE	*WORKER, DEFAULT	CLINIC 1		
04/19/2000	RIF		PAST DUE	*WORKER, DEFAULT	CLINIC 1		
04/24/2000	RIF		PAST DUE	*WORKER, DEFAULT	CLINIC 1		
04/26/2000	RIF		PAST DUE	*WORKER, DEFAULT	CLINIC 1		
05/01/2000	RIF		PAST DUE	*WORKER, DEFAULT	CLINIC 1		

- Click the **C**onfirm button.
- Complete the Confirm Pick-ups dialog box with the appropriate information.

- Click the **O**K button.

Confirm Multiple Drug Pick-Ups

Use the multi-select feature to change the status of more than one drug pick-up at the same time. This feature will save time by reducing the number of times you must repeat the same task. However, you can only change status, worker and location values when more than one pick-up appointment is selected; all other values are set to their defaults.

To select a range of pick-up appointments...

- Open the **Patient Management** module.
- Open the **Therapy** menu and select **M**edications or click the **Medications** button on the toolbar.

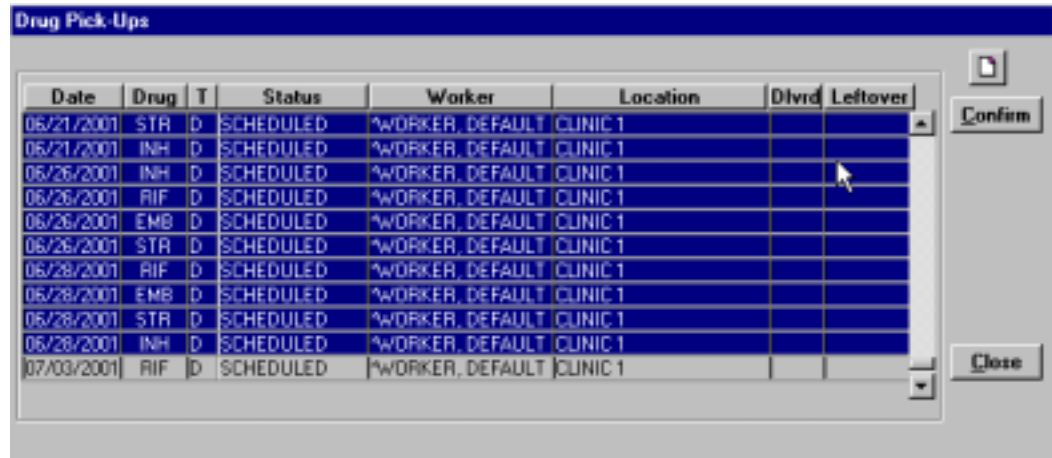


If there is no current client, the Change Focus window will open, enabling you to select one.

- Click the **P**ick-Ups button.

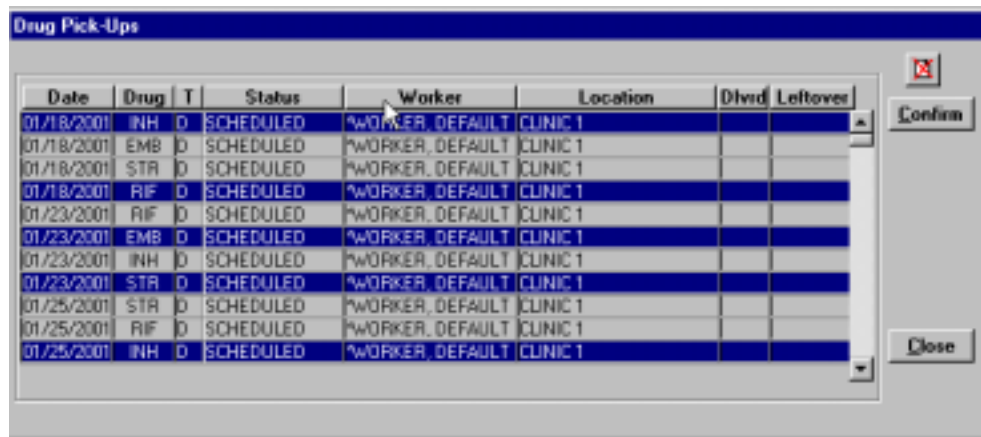
4. To select multiple *contiguous* pick-up appointments...

Select the first pick-up appointment by clicking on it with the mouse, then hold down the **Shift** key and select the last pick-up appointment you want to confirm. All pick-up appointments between the first and last ones selected will be highlighted.



To select multiple *non-contiguous* pick-up appointments...

While holding down the **Ctrl** key, select the individual pick-up appointments you want to confirm by clicking on each one with the mouse.



5. Click the **Confirm** button.

6. Enter the appropriate information in the Confirm Pick-Ups window.

Confirm a Pick-Up

Drug:

Status:

Worker:

Location:

Doses Delivered:

Delivered On:

OK

Cancel

*Warning: All changes made affect all pick-ups selected.

7. Click the **OK** button. All medications will be confirmed using the information provided.
8. Click **Close** to close the Confirm Pick-Ups window.

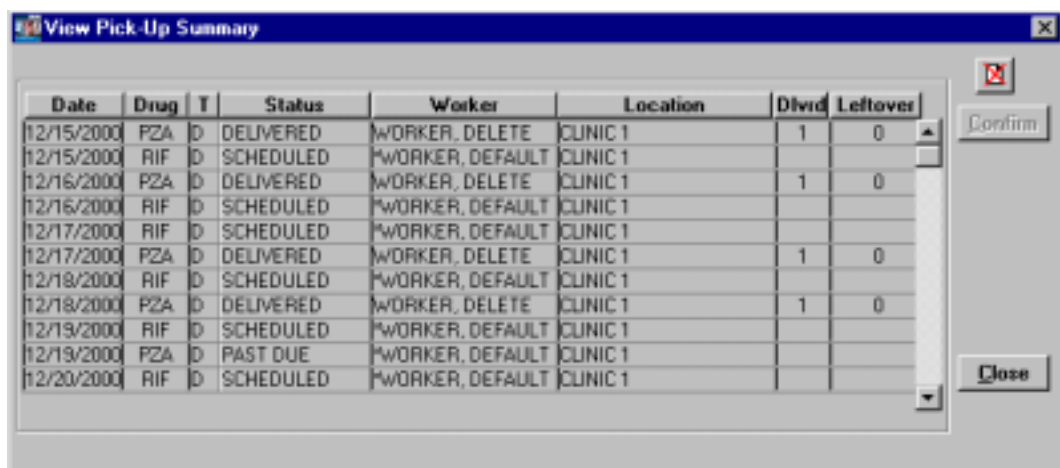
View Pick-Up Summary

TIMS provides a **Drug Pick-Up** summary screen. This allows you to view the client's pickup record, but does not allow you to edit.

To view the pick-up summary window...

1. Open the **Therapy** menu.
2. Select **View Pick-Up/Delivery**.
3. Click **Close** to close the Drug Pick-Up Summary screen.

The Drug Pick-Up Summary window appears.



Overview: Client Tests

TIMS provides the ability to record the results of the tests associated with tuberculosis. You can view and record the results using the Tests menu in the Patient Management module.

Note: Users with Low access privileges cannot add, edit, or delete client tests.

- Bacteriology Test
- Blood Test
- Chest X-Ray
- HIV
- Physical Exam
- Skin
- Test Summary (not a test)

Bacteriological and Susceptibility

The Bacteriology and Susceptibility option is used to enter and maintain information collected during the testing of a client's specimen. The Bacteriology window is used to enter smear results and culture growth data for the specimen. These results can be used to help determine the medication regimen that will provide the most effective therapy for the client.

The cultures gathered for bacteriological testing can also be used to perform susceptibility testing, and in many cases, the same laboratory can perform both tests. These two test types are so closely associated that susceptibility testing is available through the bacteriological test window.

The bacteriology test record contains the date of collection, a specimen ID, the specimen type, the anatomic site of the specimen, the results of the smear, culture growth results, species ID, and the date identified. The specimen ID, laboratory, and collection date form the basis of a susceptibility test record.

Note: Users with Low access privileges cannot add, edit, or delete bacteriology or susceptibility tests.

Add a Bacteriology Test Record

To record the results of a bacteriology test...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **B**acteriology or click on the **Bacteriology** button on the toolbar.



If there is no current client, the Change Focus window will open, enabling you to select one.

3. Click the **N**ew button.

If the New button is disabled, click the selected record in the browse list to cancel the selection.

- Enter the information from the bacteriology test as completely as possible.

Date Collected: 04/28/1997		Results Smear: <input type="text"/>	
Laboratory: <input type="text"/>		Culture Growth: <input type="text"/>	
Specimen Type: Sputum		Species ID: <input type="text"/>	
Anatomic Source of Specimen: <input type="text"/>		Date Identified: 00/00/0000	
Specimen ID: <input type="text"/>			

- Click the **S**ave button.
- Click the **C**lose button.

Edit a Bacteriology Test Record

To edit a bacteriology test record ...

- Open the **Patient Management** module.
- Open the **T**ests menu and select **B**acteriology or click on the **Bacteriology** button on the toolbar.



If there is no current client, the Change Focus window will open, enabling you to select one.

- Select the bacteriology test record you want to modify from the Bacteriology Test Summary list and click the **E**dit button.

Bacteriology Test Summary						
Collected	Specimen ID	Specimen	Smear Results	Species ID	Identified	Susc.
03/08/1997	CB970308.1441	Sputum	Positive	M. TUBERCULOSIS	03/10/1997	Not Done
03/21/1997	CB970321.0821	Sputum	Positive	M. TUBERCULOSIS	03/21/1997	Not Done
04/19/1997	CB970419.1305	Sputum	Negative		00/00/0000	Not Done

- Make the necessary changes to the selected Bacteriology Test record.
- Click the **S**ave button
- Click the **C**lose button.

Delete a Bacteriology Test Record

To delete a bacteriology test record ...

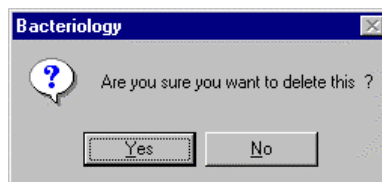
- Open the **Patient Management** module.
- Open the **T**ests menu and select **B**acteriology or click on the **Bacteriology** button on the toolbar.



If there is no current client, the Change Focus window will open, enabling you to select one.

- Select the bacteriology test record you want to delete from the Bacteriology Test Summary list and click the **D**elete button.

4. Click the **Yes** button to confirm that you want to delete the selected record. Click **No** to cancel the delete operation.



5. Click the **Close** button.

Open the Susceptibility Test Window

TIMS records the susceptibility of culture samples to treatment with one or more TB medications. This helps track drug-resistant strains of tuberculosis and determines what types of medications are appropriate.

To display the susceptibility test window...

1. Open the **Patient Management** module.
2. Open the **Tests** menu and select **Bacteriology** or click on the **Bacteriology** button on the toolbar.



If there is no current client, the Change Focus window will open, enabling you to select one.

3. Select a bacteriology test record with a positive culture from the Bacteriology Test Summary list.

Susceptibility tests can only be performed on positive bacteriological cultures. The Susceptibility window cannot be opened when a negative culture is selected.

Collected	Specimen ID	Specimen	Smear Results	Species ID	Identified	Susc.
03/08/1997	CB970308.1441	Sputum	Positive	M. TUBERCULOSIS	03/10/1997	Done
03/21/1997	CB970321.0821	Sputum	Positive	M. TUBERCULOSIS	03/21/1997	Done
04/19/1997	CB970419.1305	Sputum	Negative		00/00/0000	Not Done

4. Click the **Susceptibility Test** button on the right side of the Bacteriology window.



If the Susceptibility Test button is covered by a red X, you have not selected a positive culture specimen.

Collected	Specimen No.	Specimen	Smear Results	Species ID	Identified	Susc.
08/23/2000		SPUTUM	POSITIVE	M. TUBERCULOSIS	00/00/0000	Done

Date Collected: 08/23/2000 Laboratory: LAB ONE Specimen Type: SPUTUM Anatomic Source of Specimen: Specimen No:	Results Smear: POSITIVE Culture Growth: POSITIVE Species ID: M. TUBERCULOSIS Date Identified: 00/00/0000
--	---

Susceptibility

Susceptibility Testing Information

Date Reported: 04/28/1997 Specimen ID: CB970308.1441 Test # 1 of 4

Date Collected: 03/08/1997 Lab: Central Biologic

Drug Susceptibility

Date	Drug	Concentration	Method	Findings	Susceptibility
04/28/1997	Isoniazid	10.0 mcg/mL	Radiometric		Resistant
04/28/1997	Isoniazid	250.0 mcg/mL	Radiometric		Susceptible
04/28/1997	Isoniazid	320.0 mcg/mL	Conventional		Susceptible

Buttons: New, Edit, Delete, Save, Close

Form fields: Drug: Isoniazid, Concentration (µg/mL): 10.0, Lab Findings: , Method: Conventional, Radiometric, Direct, Indirect, Susceptibility: Resistant, Susceptible, Not Done, Unknown

Add a Drug-Specific Susceptibility Test Record to the Test Series

To record the results of a drug-specific susceptibility test to the current test series...

1. Open the **Patient Management** module.
2. Open the **Tests** menu and select **Bacteriology** or click on the **Bacteriology** button on the toolbar.



If there is no current client, the Change Focus window will open, enabling you to select one.

3. Select the appropriate bacteriology test record from the Bacteriology Test Summary list.
4. Click the **Susceptibility Test** button on the right side of the Bacteriology window.



5. If necessary, add or adjust information in the Susceptibility Testing Information group.

Susceptibility Testing Information

Date Reported: 07/23/1997 Specimen ID: ABCDE001 Test # 1 of 1

Date Collected: 07/11/1997 Lab: Central Biologic

Buttons: Add

6. Click the **New** button.
7. Select a drug from the Drug list.
8. Fill in the remaining fields with the susceptibility test data.

Drug: Isoniazid

Concentration (µg/mL): 50.0

Lab Findings:

Method: Conventional, Radiometric, Direct, Indirect

Susceptibility: Resistant, Susceptible, Not Done, Unknown

9. Click the **Save** button.
10. Click the **Close** button.

Edit a Drug-Specific Susceptibility Test Record

To change an existing drug-specific susceptibility test record...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **B**acteriology or click on the **Bacteriology** button on the toolbar.



If there is no current client, the Change Focus window will open, enabling you to select one.

3. Select the appropriate bacteriology test record from the Bacteriology Test Summary list.
4. Click the **Susceptibility Test** button on the right side of the Bacteriology window.



5. Select the drug-specific susceptibility test you want to modify. You may need to browse through the test series to find the appropriate record.
6. Click the **E**dit button.
7. Modify the drug-specific test record as necessary.
8. Click the **S**ave button.
9. Click the **C**lose button.

Delete a Drug-Specific Susceptibility Test Record

To delete a drug-specific susceptibility test record...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **B**acteriology or click on the **Bacteriology** button on the toolbar.

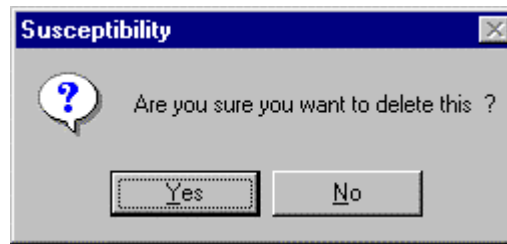


If there is no current client, the Change Focus window will open, enabling you to select one.

3. Select the appropriate bacteriology test record from the Bacteriology Test Summary list.
4. Click the **Susceptibility Test** button on the right side of the Bacteriology window.



5. Select the drug-specific susceptibility test you want to delete. You may need to browse through the test series to find the appropriate record.
6. Click the **D**elate button.
7. Click the **Y**es button to confirm that you want to delete the selected record. Click the **N**o button to cancel the delete operation.



8. Click the **C**lose button.

Create a New Specimen Susceptibility Test Series

TIMS allows you to create multiple sets of tests on a single specimen.

To create a new specimen susceptibility test series...

1. Open the **P**atient **M**anagement module.
2. Open the **T**ests menu and select **B**acteriology or click on the **Bacteriology** button on the toolbar.



If there is no current client, the Change Focus window will open, enabling you to select one.

3. Select a bacteriology test record from the Bacteriology Test Summary list.

 The "Bacteriology Test Summary" window displays a table with the following data:

Collected	Specimen No.	Specimen	Smear Results	Species ID	Identified	Susc.
08/23/2000		SPUTUM	POSITIVE	M. TUBERCULOSIS	00/00/0000	Done

 Below the table are form fields for:

- Date Collected: 08/23/2000
- Laboratory: LAB ONE
- Specimen Type: SPUTUM
- Anatomic Source of Specimen: (empty)
- Specimen No: (empty)
- Results Smear: POSITIVE
- Culture Growth: POSITIVE
- Species ID: M. TUBERCULOSIS
- Date Identified: 00/00/0000

 On the right side, there are buttons: New, Edit, Delete, Save, a user icon, a "Change Focus" icon, and a Close button.

4. Click the **Susceptibility Test** button on the right side of the Bacteriology window.



5. Click the **A**dd button in the Susceptibility Testing Information group.

 The "Susceptibility Testing Information" dialog box contains the following fields:

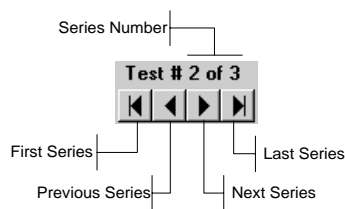
- Date Reported: 04/29/1997
- Specimen ID: CB970321.0821
- Date Collected: 03/21/1997
- Lab: Central Biologic
- Test # 2 of 3
- An "Add" button.

Click the Add button to create additional test series

6. If necessary, adjust the Date Reported values. The date cannot be greater than the current date or less than the Date Collected.
7. Verify the Specimen ID. If necessary, replace or modify the value to identify the test series.
8. Verify the Lab where the susceptibility testing was conducted.
9. Add drug-specific test records. See *Add a Drug-Specific Susceptibility Test Record to the Test Series* earlier in this chapter for more information.
10. Click the **Save** button.
11. Click the **Close** button.

Browse the Susceptibility Test Series

Use the arrow controls to display different test series.



Blood Test

TIMS allows you to maintain blood test records for TB clients. Blood testing can help you monitor the client's reaction to TB medications. TIMS tracks the results of five blood tests:

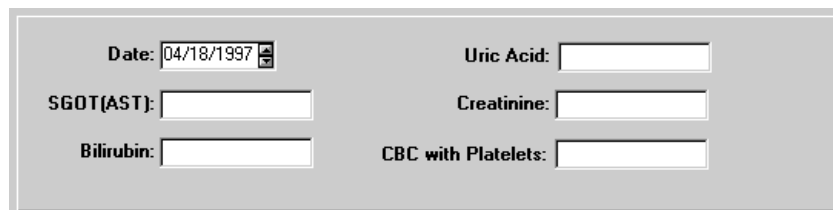
- SGOT (AST)
- Bilirubin
- Uric Acid
- Creatinine
- Complete Blood Cell (CBC) with Platelets

Note: Users with Low access privileges cannot add, edit, or delete blood tests. Each blood test record must contain a test date.

Add a Blood Test Record

To create a new blood test record...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **B**lood.
If there is no current client, the Change Focus window will open, enabling you to select one.
3. Click the **N**ew button.
If the New button is disabled, click the selected record in the browse list to cancel the selection.
4. Fill in the information as completely as possible from the printed blood test report. Be sure to adjust the Date field to match the date on the report.



The screenshot shows a form with the following fields:

Date: 04/18/1997	Uric Acid: <input type="text"/>
SGOT(AST): <input type="text"/>	Creatinine: <input type="text"/>
Bilirubin: <input type="text"/>	CBC with Platelets: <input type="text"/>

5. Click the **S**ave button.
6. Click the **C**lose button.

Edit a Blood Test Record

To change an existing blood test record...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **B**lood.
If there is no current client, the Change Focus window will open, enabling you to select one.

3. Select the blood test record to be modified from the Blood Test Summary list.

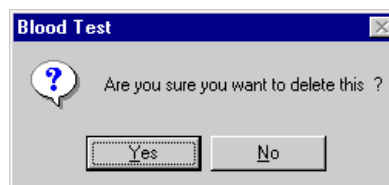
Date	SGOT(AST)	Bilirubin	Uric Acid	Creatinine	CBC with Platelets
05/17/1997	47 U/L	0.4 mg/dL	2 mg/dL	1.4 mg/dL	
04/26/1997	66 U/L	.7 mg/dL	9 mg/dL	1.8 mg/dL	
03/03/1997	87 U/L	.8 mg/dL	11 mg/dL	2.8 mg/dL	
01/12/1997	53 U/L	0.3 mg/dL	8 mg/dL	1.9 mg/dL	

4. Click the **E**dit button.
5. Change the blood test data as necessary.
6. Click the **S**ave button.
7. Click the **C**lose button.

Delete a Blood Test Record

To delete a blood test record...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **B**lood.
If there is no current client, the Change Focus window will open, enabling you to select one.
3. Select the blood test record you want to delete from the Blood Test Summary list.
4. Click the **D**efine button.
5. Click the **Y**es button to confirm that you want to delete the selected record or click the **N**o button to cancel.



6. Click the **C**lose button.

Chest X-Ray

TIMS allows you to record the results of a client's chest x-rays.

Note: Users with Low access privileges cannot add, edit, or delete x-ray records.
Each x-ray record must indicate the date the x-ray was taken.

Add a Chest X-Ray Record

To create a chest x-ray record from an x-ray report...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **Chest X-Ray**, or click the **Chest X-Ray** button on the toolbar.



If there is no current client, the Change Focus window will open, enabling you to select one.

3. Click the **N**ew button.
4. If the **N**ew button is disabled, click the selected record in the browse list to cancel the selection.
5. Fill in the information as completely as possible with the information from the x-ray itself.

View: PA (Posterior-Anterior) ▼	Results <input type="radio"/> Normal <input checked="" type="radio"/> Abnormal <input type="radio"/> Not Done <input type="radio"/> Unknown	Status <input type="radio"/> Stable <input type="radio"/> Worsening <input type="radio"/> Improving <input checked="" type="radio"/> Unknown
Date Taken: 03/21/1997 ▼		
<input checked="" type="radio"/> By: Dr. Henry Helium ▼ <input type="radio"/> Where:		
Date Read: 03/21/1997 ▼		
Read By: Dr. Henry Helium ▼		
Abnormality <input checked="" type="radio"/> Cavitory <input type="radio"/> Noncavitory consistent w/TB <input type="radio"/> Noncavitory not consistent w/TB		
Comments: <input type="text"/>		

6. Click the **S**ave button.
7. Click the **C**lose button.

Edit a Chest X-Ray Record

To edit an existing chest x-ray record...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **Chest X-Ray**, or click the **Chest X-Ray** button on the toolbar.



If there is no current client, the Change Focus window will open, enabling you to select one.

3. Select the x-ray record you want to modify from the Chest X-Ray Summary list and click the **E**dit button.

Chest X-ray Summary				
Date Taken	Result	Abnormality	X-Ray Status	View
03/13/1997	Abnormal	Noncavitary Consistent w/TB	Unknown	Lateral
04/18/1997	Abnormal	Noncavitary Consistent w/TB	Unknown	PA
04/18/1997	Abnormal	Cavitary	Worsening	PA

4. Make the necessary changes to the chest x-ray record.
5. Click the **S**ave button.
6. Click the **C**lose button.

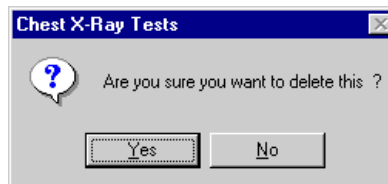
Delete a Chest X-Ray Record

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **C**hest X-Ray, or click the **Chest X-Ray** button on the toolbar.



If there is no current client, the Change Focus window will open, enabling you to select one.

3. Select the x-ray record you want to delete from the Chest X-Ray Summary browse list.
4. Click the **D**delete button.
5. Click the **Y**es button to confirm that you want to delete the selected record or click the **N**o button to cancel.



6. Click the **C**lose button.

HIV Test

HIV infection can be a factor in escalating TB infection to TB disease, TIMS allows you to keep track of a client's HIV test records.

Note: In order to protect client privacy, not all users will have access to HIV test records. If this command is not available, you probably do not have sufficient user privileges to view HIV-related information. See your TIMS System Administrator for details. To save an HIV test record, you must indicate if the test was offered and administered. Additional information may be required, depending on your initial responses.

Add an HIV Test Record

To create an HIV test record...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **H**IV.
If there is no current client, the Change Focus window will open, enabling you to select one.
3. Click the **N**ew button.
If the New button is disabled, click the selected record in the browse list to cancel the selection.
4. Fill in as much HIV test data as possible from the client's HIV testing records.

Was HIV Test Offered? <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unk		Date Test Offered: 04/14/1997
Was HIV Test Administered? <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unk		Date of Test: 04/18/1997
HIV Status: <input checked="" type="radio"/> Positive <input type="radio"/> Indeterminate <input type="radio"/> Negative <input type="radio"/> Unknown <input type="radio"/> Done, Results Unknown		If Not Tested, Reason: <input type="radio"/> Previously Positive <input type="radio"/> Previously Negative <input type="radio"/> Referred Elsewhere <input type="radio"/> Client Declined <input type="radio"/> Other
If Positive: <input type="radio"/> Medical Documentation Based on: <input checked="" type="radio"/> Patient History <input type="radio"/> Unknown		CDC AIDS Patient #: 1234567 State HIV/AIDS Patient #: 1234567890 City HIV/AIDS Patient #: 1234567890
Client Post Counseling: Did Client receive Post Test Counseling? <input checked="" type="radio"/> Yes <input type="radio"/> No		Date of Post Test Counseling: 04/18/1997

5. Click the **S**ave button.
6. Click the **C**lose button.

Edit an HIV Test Record

To change an HIV test record...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **H**IV.
If there is no current client, the Change Focus window will open, enabling you to select one.

3. Select the HIV test records you want to modify from the HIV Summary list.

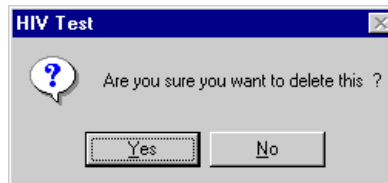
Test Date	Offer Date	Status	Based On	Date of Counseling
00/00/0000	00/00/0000			00/00/0000
04/14/1997	03/31/1997	Positive	Unknown	04/18/1997
04/18/1997	04/14/1997	Positive	Patient History	00/00/0000

4. Make the necessary changes to the HIV test record.
5. Click the **S**ave button.
6. Click the **C**lose button.

Delete an HIV Test Record

To remove an HIV test record...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **HIV**.
If there is no current client, the Change Focus window will open, enabling you to select one.
3. Select the HIV test records you want to delete from the HIV Summary list and click the **D**elete button.
4. Click the **Y**es button to confirm that you want to delete the selected record or click the **N**o button to cancel.



5. Click the **C**lose button.

Physical Examination

Physical examinations are important in the treatment of tuberculosis. The physical state of a client can help determine how they are responding to drug therapy, if they are suffering from any medication-related side effects, and whether their condition is improving. TIMS tracks five types of physical conditions:

- Weight
- Hearing
- Vision-Acuity
- Vision-Color
- INH Metabolites

Each physical examination test record must contain a test date.

Note: Users with Low access privileges cannot add, edit, or delete physical examination test records.

Add a New Physical Examination Record

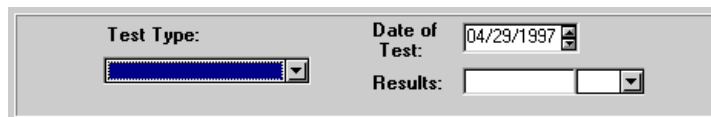
To add a new physical examination record...

1. Open the **Patient Management** module.
2. Open the **Tests** menu and select **Physical Exam**.

If there is no current client, the Change Focus window will open, enabling you to select one.

3. Click the **New** button.

If the New button is disabled, click the selected record in the browse list to cancel the selection.

A screenshot of a software form for adding a new physical examination record. The form has a light gray background and a thin border. It contains three main sections: 'Test Type:' with a dropdown menu showing a blue selection; 'Date of Test:' with a date field containing '04/29/1997' and a calendar icon; and 'Results:' with a text input field and a dropdown menu.

4. Adjust the Date of Test value to match the actual date on the test report.
5. Select the Test Type from the list.
6. Enter the test data in the Results field.
7. Click the **Save** button.
8. Click the **Close** button.

Edit a Physical Examination Record

To change a physical examination record...

1. Open the **Patient Management** module.
2. Open the **Tests** menu and select **Physical Exam**.

If there is no current client, the Change Focus window will open, enabling you to select one.

3. Select the test record you want to modify from the Physical Exam Summary list and click the **E**dit button.

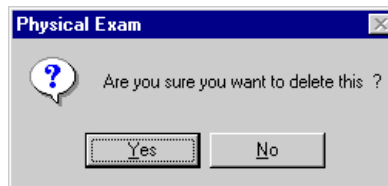
Physical Exam Summary		
Test Date	Test Type	Results
03/03/1997	Hearing	10 db
03/03/1997	Vision-Acuity	20-20
03/03/1997	Weight	185 lbs
03/03/1997	Vision-Color	Passed
04/15/1997	Weight	170 lbs
04/15/1997	Vision-Acuity	20-20

4. Make the necessary modifications to the selected physical exam data.
5. Click the **S**ave button.
6. Click the **C**lose button.

Delete a Physical Examination Record

To delete a physical examination record...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **P**hysical Exam.
If there is no current client, the Change Focus window will open, enabling you to select one.
3. Select the test record you want to delete from the Physical Examination Summary list and click the **D**ele~~t~~e button.
4. Click the **Y**es button to confirm that you want to delete the selected record. Click the **N**o button to cancel the delete operation.



5. Click the **C**lose button.

Limiting the Number of Tests Displayed

You can reduce the number of physical tests displayed in the browse list by applying a filter. This can help you locate individual tests more quickly or evaluate the results of a single test type over a period of time.

To apply a test type filter:

1. Click the arrow on the Filter by Test Type list.
2. Select the desired test type from the list of available options.

To re-display all the client's physical examination results:

1. Click the arrow on the Filter by Test Type list.
2. Select **ALL** from the list of available options.

Skin Tests

TIMS can manage data from the Tuberculin and other TB-related skin tests. This can help diagnose a client with tuberculosis and identify them as anergic or a converter. TIMS tracks four types of skin tests:

- Tuberculin
- Tetanus
- Candida
- Mumps

Note: Users with Low access privileges cannot add, edit, or delete skin test records. Each skin test record must contain a Date Tested and Type Of Test entry.

The Skin Test Window

Type of Test	Date Tested	Date Read	Induration (mm)	Result
TUBERCULIN	09/20/2000	09/22/2000	00	NEGATIVE
TUBERCULIN	12/18/2000	12/20/2000	17	POSITIVE

Type of Test:

Date Tested:

By:

Date Read:

By:

Is the Patient Anergic?
☐ Yes ☐ No ☐ Unknown

Does the Patient Meet the CDC Criteria for Being Classified as a Converter?
☒ Yes ☐ No ☐ Unknown

Interpretation:
☒ Positive
☐ Negative
☐ Unknown

Induration In Millimeters:

Comments:

Buttons: Undo, Edit, Delete, Save, Close

Add a New Skin Test Record

To create a new skin test record...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **S**kin, or click the **Skin test** button on the toolbar.



If there is no current client, the Change Focus window will open, enabling you to select one.

3. Click the **N**ew button.

If the New button is disabled, click the selected record in the browse list to cancel the selection.

- Complete the skin test screen using information from the skin test report. Include as much information as is available.

Type of Test: TUBERCULIN Date Tested: 12/18/2000 By: *WORKER, DEFAULT Date Read: 12/20/2000 By: *WORKER, DEFAULT Is the Patient Anergic? <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unknown	Interpretation <input checked="" type="radio"/> Positive <input type="radio"/> Negative <input type="radio"/> Unknown Induration In Millimeters: 17 Comments: _____
Does the Patient Meet the CDC Criteria for Being Classified as a Converter? <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unknown	

- Click the **S**ave button.
- Click the **C**lose button.

Edit a Skin Test Record

To modify a skin test record...

- Open the **Patient Management** module.
- Open the **T**ests menu and select **S**kin, or click the **Skin test** button on the toolbar.



If there is no current client, the Change Focus window will open, enabling you to select one.

- Select the test you want to change from the Skin Test Summary list and click the **E**dit button.

Type of Test	Date Tested	Date Read	Induration (mm)	Result
TUBERCULIN	09/20/2000	09/22/2000	00	NEGATIVE
TUBERCULIN	12/18/2000	12/20/2000	17	POSITIVE

- Make the necessary modifications to the skin test record.
- Click the **S**ave button.
- Click the **C**lose button.

Delete a Skin Test Record

To delete a skin test record...

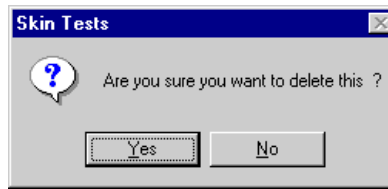
- Open the **Patient Management** module.
- Open the **T**ests menu and select **S**kin, or click the **Skin test** button on the toolbar.



If there is no current client, the Change Focus window will open, enabling you to select one.

- Select the test you want to delete from the Skin Test Summary list.

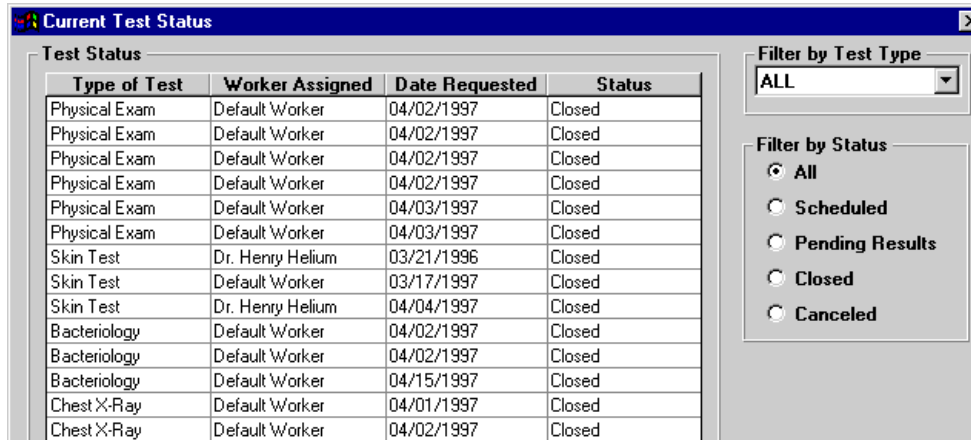
4. Click the **Ddelete** button.
5. Click the **Yes** button to confirm that you want to delete the selected record. Click the **No** button to cancel the delete operation.



6. Click the **Close** button.

Test Summary

The Current Test Status window provides a quick summary of all the test data it stores. Individual entries contain information about the test type, the worker who performed the test, the date the test was requested, and test status. The Test Summary window can be adjusted to display only certain types of tests or tests with a specified status.



Open the Test Summary Window

There are several ways to open the Current Test Status (test summary) window.

To open the Current Test Status window from the menu bar...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select **T**est Summary.

To display the Current Test Status window using the toolbar

1. Open the **Patient Management** module.
2. Click the **Test Summary** button on the toolbar.



To display a summary of a specific test type from within the test window...

1. Open the **Patient Management** module.
2. Open the **T**ests menu and select the desired test type.

- Click the **Test Summary** button on the right side of the test window.

Type of Test	Date Tested	Date Read	Induration (mm)	Result
TUBERCULIN	05/05/1997	05/07/1997	15	POSITIVE
TETANUS	05/15/1997	05/17/1997	01	NEGATIVE
CANDIDA	05/23/1997	05/25/1997	00	NEGATIVE

Type of Test: TUBERCULIN
Date Tested: 05/05/1997
By: IODINE, IOLA
Date Read: 05/07/1997
By: IODINE, IOLA
Induration In Millimeters: 15
Interpretation: ☒ Positive ☐ Negative ☐ Unknown
Comments:
Is the Patient Anergic? ☐ Yes ☐ No ☐ Unknown
Does the Patient Meet the CDC Criteria for Being Classified as a Converter? ☐ Yes ☐ No ☒ Unknown

Buttons: New, Edit, Delete, Save, Close. An arrow points to a small icon (a hand with a red X) located between the Save and Close buttons.

Filtering the Current Test Status Window

TIMS allows you to control the number of test summaries displayed in the Current Test Status window by adjusting two variables- Test Type and Status. The two variables can be combined to further limit the number of records displayed.

To filter the Current Test Status window by test type...

- Open the **Patient Management** module.
- Open the **Tests** menu and select **Test Summary**.
If there is no current client, the Change Focus window will open, enabling you to select one.
- Click the arrow on the Filter by Test Type list.
- Select an individual test type or **ALL** to display all test types.

Filter by Test Type

- ALL
- Physical Exam
- Skin Test
- Sputum Collection
- X-Ray
- Blood Test

Selecting an individual test type will produce the same results as clicking the Test Summary button on a test window.

To filter the Current Test Status window by status, select a status from the Filter by Status group.

Filter by Status

- ☒ All
- ☐ Scheduled
- ☐ Pending Results
- ☐ Closed
- ☐ Canceled

Patient Management Reports

The Patient Management Module offers several reports which display information on individual patients. The reports are based on data entered into the Patient Management Module.

- Adherence: Appointments
- Adherence: Assigned Workers - This report is not available in the current version of TIMS.
- Adherence: Medication Metabolite
- Contact Report
- Medical Report: Summary
- Medical Report: Blood Tests
- Medical Report: HIV Tests
- Medical Report: Skin Tests
- Medical Report: X-Ray Tests
- Therapy: Medication
- Therapy: Medication Outcome

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